ONTARIO
Yours to discover

Ontario Tourism Marketing Partnership Corporation
Business Plan 2015-16

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EXECUTIVE SUMMARY: LAUNCHING STRATEGY

Tourism in Ontario represents **a $28.1 billion industry**, generating some **359,000 jobs** and contributing to **economic prosperity**. The Ontario Tourism Marketing Partnership Corporation (OTMPC) is the lead provincial organization marketing Ontario as a destination, partnering with regions and the tourism industry locally and globally to grow market share.

Ontario **visits** are forecast to **grow** an average of **1.9% per year** from **2013 to 2017** while visitor **spending** is forecast to grow an average of **6.1% per year**. **By 2017**, total **visits** are forecast to reach **156 million** with visitor spend of **$30 billion**.

2015-16 will be year two of OTMPC's *Strategic Plan 2014-17* designed to inspire future priorities and goals:

Vision
To position Ontario as a preferred global destination

Mission
To generate increased visitation by Ontario, Canadian and international tourists, enhance tourism expenditures in Ontario, and contribute to provincial economic prosperity through impactful marketing and results-oriented investment partnerships.

Strategic Priorities:

1. **BUILD AND DELIVER THE CASE FOR INVESTMENT**
   - Champion the economic value and impact of tourism industry sectors
   - Create and support inter-ministerial synergies
   - Generate an effective communications strategy that celebrates the tangible benefits of investing in building the Ontario tourism brand
   - Enhance links to and relationships with business industry leaders (e.g. chamber of commerce)

2. **BUILD A POWERFUL BRAND THAT DRIVES RESULTS**
   - Create and effectively execute the big brand idea – an emotional campaign to drive tourism visits and spend aligned to the brand strategy
   - Focus on key target markets and their audiences using OTMPC marketing insights
   - Encourage tourism industry to develop content/packages to attract the international market – 'Ontario Signature Experiences'
   - Identify and measure against key performance indicators

3. **DEVELOP AND EXECUTE AN EFFECTIVE PARTNERSHIP STRATEGY**
   - Maximize stakeholder investment in OTMPC marketing programs
   - Champion the Ontario brand to partners to adopt into their campaigns
   - Secure new external and private sector partners to participate in OTMPC programs
   - Measure and track brand alignment and partner investments

4. **EMBRACE ORGANIZATIONAL INNOVATION AND EFFECTIVENESS**

   Board
   - Actively participate to strengthen strategic relationships that champion and promote tourism's value and economic impact

   Committees
   - Inform and advise on tourism's value to the economy

   OTMPC
   - Foster a culture of leadership, passion and accountability
   - Encourage and reward fact-based decision making
   - Operate with an investment mindset
   - Be forward looking and find new and innovative products

ENVIRONMENTAL SCAN

Global Economic Environment
According to Oxford Economics, the global economy is on a modest growth path.

Canada's economy is sensitive to the performance of the American economy. The United States is going through its slowest post-recession recovery since 1975, with just over 2% GDP growth rate for the past two years, and is forecast to grow at a similar rate for the next three years. The outlook remains optimistic as consumer and corporate indebtedness decline, the housing market strengthens and consumer confidence is at its highest since 2008. So far, consumer spending has been lagging but a declining unemployment rate, reasonable inflation and expected wage increases are forecast to support stronger consumer spending.[1]

Recovery in the Eurozone continues to be sluggish, with deflation still a risk. Growth in the Eurozone is uneven, with the strength in Germany offset by contracting or stagnant activity in many other countries.[2]

Growth rates have slowed in China, though they remain high compared to the rest of the world. China is tackling a credit challenge and foreign investment has been declining both in China and India.

Over the past few years, a strong financial system and resource-based economy allowed Canada to avoid the severity of economic challenges faced by other developed countries. However, slowing economic growth in emerging countries, slow growth in the U.S. and Europe, and a resulting lack of export recovery has resulted in slower growth that is being driven primarily by consumer spending. Ontario has been especially impacted by a loss of manufacturing jobs in recent years.

In this economic environment, prevailing consumer sentiment is having an impact on consumer behaviour around the world. In most developed countries, including the U.S. and Canada, consumers have increased their savings rate and curtailed spending. In emerging markets, like China and India, fast-growing industrial production is resulting in the emergence of a populous middle class with the means for consumption and a keen interest in travel.

The travel forecast to 2017 from the Ministry of Tourism, Culture and Sport (MTCS) indicates an average annual visitation growth rate of almost 2% from within Ontario, 7% from overseas countries and less than 1% from the United States. Still, Ontario's key traditional source markets, including Ontario, the United States and the United Kingdom, will continue to account for the largest volume of inbound visits and visitor expenditures in absolute terms.

China has now surpassed all other countries to become the number one source of outbound tourism in the world, and the third-largest inbound market for Ontario after the United States and United Kingdom in terms of visitation.

Competitive Environment
Ontario's tourism industry is operating in an increasingly competitive environment. More countries recognize the potential of tourism as an economic contributor and jobs driver. Many nations are increasing investments in tourism product development and marketing. Travel consumers have also broadened their horizons, leading to the emergence of new travel destinations. With increased choice, mature destinations like Ontario must invest to build new tourism products or refresh its existing tourism products, and invest in more competitive marketing.

Brand USA now provides the United States with a robustly-funded strategic marketing organization. One of its primary target markets is Canada, with emphasis on Ontario. Along with a relatively strong Canadian dollar, this

[1] Oxford Economics Global Economic Outlook, September 2014
[2] Bank of Canada Monetary Policy Report, July 2014

results in increased outbound travel from Ontario to the United States. Brand USA's international marketing investments also generate significant competition for our marketing efforts overseas.

Cheaper and more convenient flights has resulted in increased air travel, though airfare to and from Canada remains more expensive than from American airports. Seat capacity from China and Japan to Ontario continues to grow with more flights opening from Shanghai, Beijing and Tokyo. New routes to Canada are needed to optimize competitive advantage.

Travel Behaviour and Expenditure

While consumers remain committed to travel, indications are that, as was the case in recent years, they are planning on taking fewer or shorter trips, travelling to nearby destinations and cutting back on accommodation, restaurant and recreational spending. Nonetheless, today's value-conscious travellers appear to be willing to pay for unique, authentic experiences.

Travel within Ontario carried the provincial tourism industry over the last couple of years in the face of a major decline in visits from the United States. By 2017, *Ontarians will account for 86% of visitation and 56% of visitor expenditures in Ontario.* However, the growing number of outbound visits by Ontarians poses a risk to domestic travel.

Within Canada, Quebec remains Ontario's largest source market. Quebeckers perceive Ontario as appealing and safe, particularly South Eastern Ontario, Toronto and Niagara Falls. However, Quebeckers find Ontario generally indistinguishable from their own tourism offerings, with which they are more comfortable.

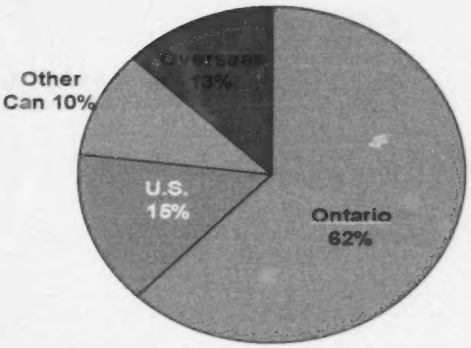
American travellers continue to favour their own domestic destinations to avoid border inconveniences. Despite limited direct advertising in the United States near markets (border state or short-haul flight), Ontario's standing as a short-trip destination has been stable in the last few years, though at a lower level than previously. In United States mid-markets (short-haul flight or day's drive), Ontario continues to have a low profile as a potential destination; there is limited consumer knowledge about what Ontario has to offer. By 2017, American travelers will account for 8% of visitation to Ontario and 17% of visitor expenditures in Ontario.

In 2012, OTMPC competitively procured TNS Canada to survey a sample of 69,000 travellers across Ontario, Manitoba, Quebec, and the U.S. near- and mid-markets via on-line and mail interviews. The study identified 12 potential travel consumer segments: Pampered Relaxers, Sports Lovers, Knowledge Seekers, Up & Coming Explorers, Connected Explorers, Aces, Outgoing Mature Couples, Family Memory Builders, Mellow Vacationers, Nature Lovers, Solitaires, and Youthful Socializers. OTMPC will continue to use this research to inform its marketing decisions.

By 2017, overseas source markets will continue to represent a small proportion (2%) of visitation to Ontario, though these markets are high yield and are expected to grow from 13% to 19% of visitor spending as travelers from these countries stay longer and try to see and do as much as they can during their stay (see charts and table page 5-6).

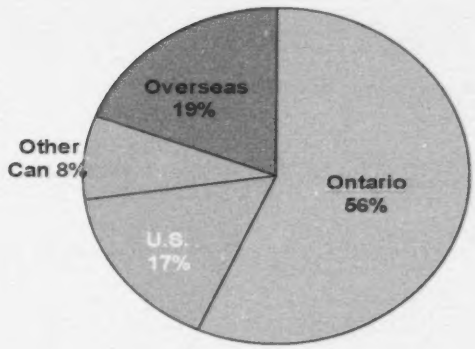
With the growth of the new middle class in emerging markets, there is greater potential for increased visitation. Tapping into new source markets and providing competitive customer service will require enhanced understanding of the different needs and interests of international travellers. OTMPC recognizes the need to establish and promote a strong emotional connection with the "Ontario, Canada" tourism brand.

2012



Visitor Expenditures by Origin
$22.3 billion

2017 Forecast



Forecast Visitor Expenditures by Origin
$30 billion

Source: Statistics Canada, Travel Survey of the Residents of Canada 2012, International Travel Survey 2012

Social and Cultural Environment
Global and provincial demographic changes also impact travel to Ontario. Within the province, Ontario's population is getting older. Although the empty-nester baby boomer generation has more money and time to travel than previous generations, its net worth has been eroded in recent years and many plan to keep working longer. Younger generations are emerging with spending power and high propensity to travel. Ontario's best opportunity with regards to intraprovincial travel is to offer quality competitive tourism experiences for short getaways.

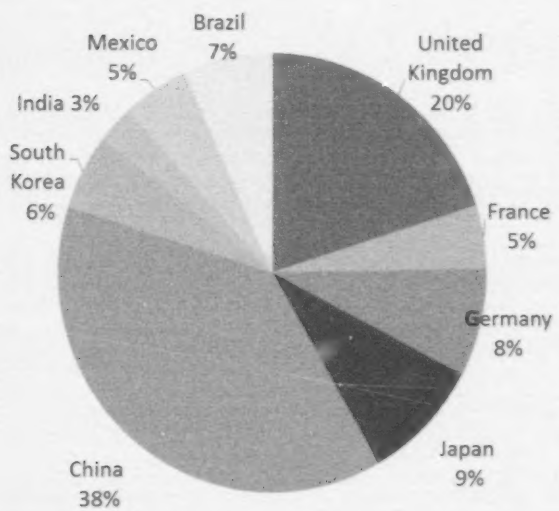
Many of Canada's new immigrants are settling across the Greater Toronto Area (GTA). While integrating into an English-speaking culture, many maintain their mother tongue, demonstrated in part by media consumption. Although newcomers tend to travel to their homeland, a desire to know their new surroundings and share them with visiting friends and relatives provides a timely opportunity for Ontario tourism. To better serve Ontario's diversity from within the province and a widening array of international markets, future tourism offerings need to be more tailored to different cultural backgrounds, culinary preferences and travel interests.

Technology
Advances in technology and rapid consumer adoption rates offer both an opportunity and a challenge. Easier digital access for consumers to obtain information and plan travel is imperative in a highly competitive marketing environment. Digital "channels" also play an inspirational role through the sharing of consumers' travel experiences during and after their trips. As well, new emerging consumer communications are changing the digital landscape, including mobile advertising, user-generated content, full-length professional videos and location-based communications. Marketing approaches are shifting rapidly to content marketing and consumer engagement.

2012 Actual and 2017 Forecast Expenditures (Millions of Dollars)

Market	2012	2017F	Growth 2017 - 2012	% Change 2017/2012
Ontario	**$13,809**	**$16,753**	**$2,945**	**21%**
Other Canada	**$2,262**	**$2,507**	**$245**	**11%**
US Border	**$1,848**	**$2,873**	**$1,025**	**56%**
Other U.S.	**$1,491**	**$2,083**	**$592**	**40%**
Total Overseas	**$2,912**	**$5,758**	**$2,847**	**98%**
United Kingdom	$423	$660	$236	56%
China	$354	$1,256	$901	254%
Germany	$175	$263	$88	50%
Japan	$181	$298	$117	65%
Brazil	$165	$222	$57	35%
France	$104	$152	$48	46%
India	$87	$92	$4	5%
Mexico	$73	$166	$94	129%
South Korea	$49	$182	$133	273%
Other Overseas	$1,301	$2,468	$1,167	90%
TOTAL	**$22,321**	**$29,974**	**$7,653**	**34%**

Visitor Expenditures by Country - Projected 2017



- Forecast total visitor expenditures from target markets: $3.3 Billion
- Share of European target markets: 33%
- Share of Asian target markets: 55%
- Share of target markets in the Americas: 12%

Source: Statistics Canada, International Travel Survey 2012

MOVING FORWARD: 2015-16 OTMPC BUSINESS PLAN

The 2015-16 Business Plan marks year two of the Ontario Tourism Marketing Partnership Corporation's (OTMPC's) Strategic Plan 2014-17. The Business Plan is designed to grow visitation and visitor expenditures, aligned to the Strategic Plan's four strategic priorities. Analysis of performance in years one and two in conjunction with market and visitation forecasts will inform any necessary course correction throughout the year. This information will also inform development of the Business Plan for year three, 2016-17.

1. BUILD AND DELIVER THE CASE FOR INVESTMENT

1.1 Champion the economic value and impact of tourism industry sectors

OTMPC will actively participate in raising awareness about the economic contribution of tourism visitation and expenditures to Ontario, championing the value and impact of tourism. Key messages will emphasize in-province tourism, as well as visitation and expenditures emanating from the United States and European and Asian markets. OTMPC will underscore the collaborative role that the tourism industry plays through partnerships designed to position the provincial brand as a global destination of choice. Communications will include the impact of major events, particularly the Pan/Parapan Am Games in 2015.

1.2 Create and support inter-ministerial synergies

OTMPC will partner and collaborate with other ministries to align tourism to economic priorities, including international investments, transportation, ONroute highway service centres, post-secondary education student recruitment, and aboriginal tourism development. OTMPC will also collaborate within MTCS to support major tourism agency and attraction colleagues such as the Niagara Parks Commission, St. Lawrence Parks Commission, Fort William Historical Park, Ste.-Marie among the Hurons and Discovery Harbour as well as the Ministry of Economic Development, Employment and Infrastructure, the Ministry of Citizenship, Immigration and International Trade and the federal government in delivering marketing and trade activity in key overseas markets.

1.3 Generate an effective communications strategy that celebrates the tangible benefits of investing in building the Ontario tourism brand

OTMPC will develop a comprehensive corporate and continuous communications approach that celebrates the value and impact of tourism to government, industry partners and other stakeholders. Key messages will include: tourism's current and projected economic impact, OTMPC's marketing and research excellence, and the benefits of partnerships. The OTMPC Marketing Strategy, the revitalized Tourism Consumer Information System (TCIS), the tourism partners website and the bi-monthly Passport newsletter will be aligned to broadcast key messages.

1.4 Enhance links to and relationships with business industry leaders (e.g., Chamber of Commerce)

OTMPC will actively engage with the greater Ontario business community to link tourism to the greater Ontario community, including accommodation (hotels, motels and resorts), transportation (airlines, rail, and commuter), retail (shopping being a number one activity for tourists), and food and beverage (restaurants, wineries). As well, the Ontario Travel Information Centres (OTICs) will grow links to customer service-oriented tourism welcome centres across the province in part through the 3rd Annual OTIC Conference to which travel centres across Ontario and Canada will be invited. OTMPC will partner with Ontario Chambers of Commerce, Festivals and Events Ontario, Attractions Ontario, Resorts Ontario, Regional Tourism Organizations (RTOs), Destination Marketing Organizations (DMOs) and tourism industry professionals to optimize mutually-beneficial opportunities.

2. BUILD A POWERFUL BRAND THAT DRIVES RESULTS

2.1 Create and effectively execute the big brand idea – an emotional campaign to drive tourism visits and spend aligned to the brand strategy

OTMPC invested in international brand research that revealed travellers in the 11 countries in which OTMPC actively markets are generally aware of Niagara Falls and Toronto as icons driving visitation to inform its business-to-business (B2B) and business-to-consumer (B2C) strategies and tactics. The research revealed that international tourists conceive the ideal Ontario vacation as both exciting and relaxing. In 2015-16, OTMPC will continue to focus on bringing the brand essence of "surprising contrast" to life, in order to position Ontario, Canada strongly in the global marketplace. This "brand DNA" aligns well with the 'vibrant cities close to nature' messaging currently featured in Canadian Tourism Commission (CTC) advertising.

Business-to-Consumer:
To position Ontario as a preferred destination, OTMPC will deploy compelling visuals and powerful language and lead with experiences that resonate with consumers by target market. To serve consumer digital preferences, OTMPC will continue to invest in social media and the revitalized website. Travel content aligned to consumer preferences along the purchase cycle will accelerate decision-making, grow awareness and stimulate greater levels of conversion. The brand campaign will continue to complement MTCS's music strategy, launched to promote Ontario as a major destination for the creation and performance of Canadian music.

OTMPC will continue with its "theme campaigns" marketing strategy launched in spring 2014. Free standing inserts (FSIs) will be distributed in Ontario and key markets in the United States. With a focus on continuity planning, these campaigns are designed to support a *continuous presence* in market throughout the year. This print platform provides a vehicle for industry, sector associations and RTOs to co-invest through advertising. The FSIs provide opportunities for travel packages and are supported through the website, social media and media relations. The spring and summer consumer campaign will also be supported by targeted television advertising with emphasis on the Pan / Parapan Am Games in 2015.

With the internet and social media now central to global travel planning and booking across all age and income groups, OTMPC will continue to revitalize TCIS to support the new global brand. Over 80% of Canadian travellers cite websites as their usual travel shopping method, according to PhoCusWright's *Canadian Online Travel Overview*. To meet current and future consumer travel research and booking preferences, the new TCIS will include trip planning tools, interactive maps, a mobile responsive website, and more. In 2014-15, OTMPC launched Release 1 and 2 of TCIS. This work included the backend functionality to enable further addition of functionality such as a new consumer interface with an intuitive menu ("Explore, Play, and Plan"), mapping and planning trips. Added functionality of the redeveloped TCIS is intended to increase visits to the website by 15% per year, and increase the number of social media followers.

OTMPC's OTICs will actively reinforce the brand strategy through effective personal customer service (see page 12).

Business-to-Business:
OTMPC's media relations will align with the overall brand strategy to generate positive editorial coverage of Ontario's tourism product in priority markets. Media relations will ultimately provide a consumer-facing, credible third-party endorsement to inform and inspire consumer travel plans. Key opinion leaders in priority markets provincially, nationally and internationally will be engaged, with particular emphasis on the higher-yield markets (tourists with higher average spend per vacation).

OTMPC will continue to work with industry partners to support media and trade through

familiarization tours: creating itineraries and arranging for in-kind services by industry partners in a number of sectors - accommodation, transportation, culinary, attractions and others.

OTMPC will continue to focus its social media strategy to drive consumer engagement through primary social media channels as guided by the following principle: growing conversations in all OTMPC key markets through the use of a centralized brand voice; assisting with industry alignment for all partnerships (RTOs, DMOs, attractions and others) while focusing on emotional appeal; and use of and alignment of consumer-generated content as the travel inspiration tool and for partner product promotion.

2.2 Focus on key target markets and their audiences using OTMPC marketing insights

In 2015-16, OTMPC will continue to use its three-tier market prioritization strategy. A keen eye will be kept on markets in each category to ensure that adequate energies are being applied to maximize consumer, media and trade response. In the event that markets show significant positive or negative potential their tier assignment may change as appropriate (changes for 2015 include South Korea moving up to Tier 2 and India moving down to Tier 3), For a second year, OTMPC will attend the 2015 Australia Corroboree to train Australian travel trade on Ontario tourism product.

Business-to-Consumer & Business-to-Business:

- Investments in Tier 1 markets will focus on brand advertising, travel trade and media relations and include Ontario, Quebec, the United States (New York, Michigan, Pennsylvania) and China.
- Investments in Tier 2 markets will focus on CTC partnerships, travel trade and media relations and include U.K., Japan, Germany, Brazil, France and South Korea.

Business-to-Business:

- Investments in Tier 3 markets will focus on media relations and include india, Mexico and the rest of Canada. OTMPC will be ready to course adjust market tiers based on various indicators including visitation forecasts, changes to visa processing and travel rules, among others.

OTMPC will partner strategically with all RTOs, DMOs and the industry as appropriate to international markets, with international partnership emphasis on RTO2 Niagara, RTO5 Toronto and RTO10 Ottawa which are positioned to collaboratively invest. In 2015, OTMPC will partner the CTC and Niagara Falls Tourism to hold Rendez-vous Canada (RVC), in Niagara Falls. RVC is Canada's annual premier international tourism marketplace attended by over 1,500 international tourism professionals.

OTMPC will continue to provide opportunities for Ontario travel trade to take their product to market at trade shows and sales missions. The focus will remain product that is market ready. Through OTMPC's contacts with industry, RTOs and individual operators, OTMPC will continue to educate and provide overseas travel trade and media relations support to close the sale through media and product buyer familiarization trips.

Business-to-Consumer:
In 2012-13, OTMPC and the provincial RTOs invested in a Consumer Insight Research study, resulting in over 69,000 responses from Ontario, Quebec, Manitoba and 21 states in the northeastern United States. The research identified 12 distinguishable tourism consumer segments, prioritized specific segments as primary targets for each provincial tourism region, and identified the segments with the most potential for the province as a whole. The detailed segment profiles continue to empower the development of effective and targeted marketing strategies.

In 2015-16, OTMPC will continue to focus North American branding and marketing endeavours to entice four to five priority

consumer segments with the greatest promise of increasing visitation and expenditures, in particular, "Knowledge Seekers", "Up & Coming Explorers", "Connected Explorers" and "Family Memory Builders". Pan / Parapan Am Games marketing will additionally target the sports tourist.

Northern Programs:
OTMPC's 2015-16 campaign will focus Northern Office investments to support the 'avid' tourism industries of fishing, hunting, powersports touring and outdoor adventures. In partnership specifically with RTOs 12 and 13, OTMPC will work with major communities in the north to promote northern cities as both destinations and gateways. To position Northern Ontario as a unique destination, OTMPC will build relationships with relevant airlines and reach into Manitoba, Quebec and the adjacent states of Minnesota, Wisconsin, Michigan and Illinois. OTMPC will also reach out to consumers in the 'avid' markets of Pennsylvania (fishing).

Post WorldPride 2014, OTMPC will continue to use legacy marketing assets targeting the Lesbian, Gay, Transgendered and Bisexual (LGBT) communities.

Marketing efforts will continue to support the 2015 Pan / Parapan Am Games. A dedicated Visitor Engagement team has been assembled to lead the planning and delivery of showcase celebrations, including the Ontario Canada Celebration Zone, a key priority that will link to other festival sites such as Nathan Phillips Square. The team will also be responsible for promotion of the torch relay, a games-specific social media tourism engagement strategy, and execution of a regional and community visitor engagement plan.

2.3 Encourage tourism industry to develop content/packages to attract the international market – 'Ontario Signature Experiences'

OTMPC will continue to build the new Ontario Signature Experiences program to foster mutually-beneficial B2B relations and promotion of iconic tourism experiences that drive visitation. Aligned to the CTC's Signature Experiences program, Ontario's program will encourage international tour operators and broader colleagues that Ontario offers a wide range of tourism activities of high calibre, and will address a lack of awareness about culinary, cultural and urban experiences across the province.

2.4 Identify and measure against key performance indicators

OTMPC will measure the success of its endeavours by focusing on a number of specific performance measures: destination awareness and ranking of Ontario as a destination by consumers, advertising return on investment (ROI), and conversion metrics for consumers choosing travel to or within Ontario. The Balanced Scorecard (see page 13) serves as a reporting tool where goals align to the four strategic pillars.

2.5 Identify and measure against key performance

As the largest international sport event ever held in Ontario, the 2015 Pan / Parapan Am Games provide a unique opportunity to promote Ontario on the national and international stage. OTMPC will host a dynamic Celebration Zone during the games that will showcase the best of Ontario and promote Ontario as a centre of creativity, diversity, innovation and inclusion. Featuring live entertainment, experiential programming and signature attractions, the Celebration Zone will include the participation of other provinces and territories, RTOs and a diverse range of Ontario business, tourism, culture and community partners.

The 2015 Pan Am and Parapan Am Torch Relays will build excitement for the games across Ontario and will create profile opportunities for tourism attractions and experiences all along the Torch Relay routes. OTMPC will encourage the active participation of RTOs in local Torch Relay celebrations, as well as work with local organizers and TO2015 to promote the Torch Relays and ensure a

strong provincial presence at Torch Relay events.

3. DEVELOP AND EXECUTE AN EFFECTIVE PARTNERSHIP STRATEGY

3.1 Maximize stakeholder investment in OTMPC marketing programs

OTMPC will implement enhanced partnerships with corporate partners, the CTC, RTOs, DMOs, provincial industry sectors, and tourism operators. OTMPC's primary goal is to optimize mutually-beneficial participation in provincial, national and international marketing efforts. With a leverage or co-investment approach, OTMPC will engage stakeholders to collaborate in the generation of packages, products and experiences. OTMPC will partner through joint marketing programs with industry and collaborate to generate innovative opportunities for industry engagement. OTMPC will position the agency as a true collaborator, open to ideas that industry believes will further market development, industry economic development, and prosperity.

3.2 Champion the Ontario brand to partners to adopt into their campaigns

OTMPC will work with all its stakeholder partners to position Ontario Canada as a preferred local and global tourism destination. To encourage marketing alignment and co-investment, OTMPC will lead international missions that celebrate tourism assets under an Ontario Canada umbrella, and encourage development and marketing of enticing packages, products and tourism experiences to attract new customers.

Through revisions to the Tourism Event Marketing Program (TEMP) and the Tourism Industry Partners Program (TIPP), OTMPC will encourage greater investment in out-of-province collaborative marketing endeavors. OTMPC has enhanced these two partnership programs to drive tourism growth within the province and to Ontario nationally and internationally.

In 2015, TEMP will have one application deadline for OTMPC's fiscal year. Funding support for TEMP will continue to be up to 75% of an applicant's in-province media buy (to a maximum of $20,000) and up to 50% of an applicant's out-of-province media buy (to a maximum of $150,000). Funding support for TIPP will continue to be up to 40% of an applicant's out-of-province media buy (to a maximum of $200,000). Starting in 2015, TIPP criteria will require that the lead partner be limited to investing a maximum of 70% based on the overall marketing campaign costs, excluding OTMPC's contribution.

In 2015, the OTMPC's Northern Office will adopt new criteria for marketing partnerships as presented during the August 26, 2014 Northern Committee meeting in Thunder Bay and approved by the OTMPC Board of Directors. A consortium of partners is to be defined as two or more eligible stakeholders with OTMPC's investment limited to a maximum of $100,000 per approved project, representing no more than 49% of overall project cost. These marketing partnerships will adopt a Joint Marketing Agreements (JMAs) template for implementation.

3.3 Secure new external and private sector partners to participate in OTMPC programs

In 2015-16, OTMPC will expand awareness of beneficial marketing opportunities in order to increase stakeholder participation in effective partnerships. A proactive approach will be implemented that communicates the benefits of partner engagement and enhances the reputation of OTMPC as a high-performing tourism marketer. OTMPC will endeavour to work with new corporate prospects in the accommodation, sports, food services, clothing, luggage, sports, and heritage and transportation sectors in order to:

- Maximize stakeholder investment in OTMPC's marketing programs
- Champion the Ontario brand to partners to adopt into their marketing campaigns

- Secure new external and private-sector partners to participate in OTMPC's programs, and
- Measure and track brand alignment and partner investments.

OTMPC thereby will develop new tourism marketing partnerships aligned to themed campaigns, extend market reach and generate revenues. OTMPC partnership staff will collaborate with RTOs, DMOs and industry colleagues to build and grow ongoing partnerships that are mutually beneficial.

The province's 11 OTICs are key players in the development of ongoing partnerships with both tourism consumers and industry stakeholders. Travel centres create a positive first impression for visitors and provide an essential link between the consumer and the tourism industry. In August 2014, OTMPC relocated its Toronto OTIC from Atrium on Bay to the revitalized Union Station. The Union Station location puts travel information services within reach of 30 million travellers a year. The OTICs will continue to partner with Ontario Parks and the Pan / Parapan Am Games to sell merchandise celebrating Ontario and the games to visitors. The OTICs will continue partnerships with RTOs to sell tourism experiences and offer onsite advertising opportunities to stakeholders. The centres will continue to provide customized in-person information and advice on where to go and what to see and do with a view to extending visitor stay.

OTMPC will continue to work in partnership with the Ministry of Transportation (MTO) to improve travel information services as part of the reconstruction of 400-series highway ONroute service centres, providing content for electronic travel information kiosks.

3.4 Pan / Parapan Am Visitation Engagement Partnerships

OTMPC will collaborate with games partners to align and optimize support for games-related festivals and celebrations, including Torch Relay community celebrations, the live celebration site at Nathan Phillips Square, the aboriginal pavilion, PrideHouseTO and francophone programming at venues, festivals and events across the games "footprint". In promoting these and other activities, OTMPC will position Ontario as a leader in diversity, accessibility and inclusion, and a "must-visit" destination in 2015 and beyond.

OTMPC will engage tourism organizations within the games footprint to use the games as a catalyst to develop and promote tourism at the local level. OTMPC will also lead regional and sector participation in the full range of marketing and promotion opportunities presented by the games, including the Celebration Zone, the Torch Relays and other celebrations, festivals and events during the games.

3.5 Measure and track brand alignment and partner investments

OTMPC will continue to encourage partnerships that provide direct co-investment and/or leverage in-kind investment from industry, and will work to optimize public/private-sector resources to effectively and efficiently market Ontario as a year-round destination. OTMPC plans to grow leveraged cash by at least 10%. OTMPC will ensure its partnering opportunities and offers reflect the needs of industry stakeholders and target consumer segments.

OTMPC will continue to report performance results at a program level as well as rolled up for quarterly review at OTMPC Board of Directors meetings.

4. EMBRACE ORGANIZATIONAL INNOVATION AND EFFECTIVENESS

4.1 BOARD: Actively participate to strengthen strategic relationships that champion and promote tourism's value and economic impact

The OTMPC Board of Directors meets four times a year to provide advice, strategic direction and oversight related to agency

activities. The Board will also endeavour to be represented at various industry events to demonstrate member support for the Ontario tourism industry, and engage in championing tourism's importance to the Ontario economy. As well, OTMPC's Senior Management Team and staff will continue to build government and industry links and develop partnerships to strengthen relationships.

The Board of Directors will meet once a year outside of Toronto and where possible will use this as an industry connection activity. In May of 2015, the Board of Directors will meet during the Rendez-vous Canada conference to enable Board members to meet industry leaders and attend information sessions.

4.2 COMMITTEES - Inform and advise on tourism's value to the economy

OTMPC will engage its RTO Advisory Committee, Sector Advisory Committee, Marketing Metrics Advisory Committee and Northern Tourism Marketing Committee to ensure the agency receives timely input designed to optimize outputs and outcomes from OTMPC investments. OTMPC will engage its committees to share information as well to provide advice related to effective implementation of the agency's vision and mission, and to disseminate communications messages about the importance of tourism to the Ontario economy.

4.3 OTMPC - Foster a culture of leadership, passion and accountability

Throughout 2014, the OTMPC President's Counsel on Innovation and Creativity continued to work on transforming the agency's working culture away from one that is hierarchical, to one that emphasizes inter-department collaboration, innovation and creativity, and impactful marketing. At a priorities workshop, Counsel members identified four organizational culture priorities (leadership, team development, learning and training, and product development knowledge) and two creativity and innovation priorities (communications and integrated / streamlined / improved systems). In 2015, the next steps for each priority are: gap analyses and implementation based on advice from the management team and from external representatives with relevant expertise.

Team meetings, including a Directors' Table, Leadership Committee, regular All Staff meetings, and ongoing team meetings, continue. These meetings help to promote intra- and inter-team collaboration and information sharing.

In 2015, OTMPC plans to complete Level 2 Progressive Excellence Program certification with Excellence Canada. The organization achieved acceptable scores on leadership, planning, customer / client focus, people focus, and supplier / partner focus and was commended for best practices such as its 2014-2017 Strategic Plan, Travel Counsellor Training Program, the President's Counsel, OTIC Student Bursary, general partner collaboration and passion for tourism customers and Ontario. Excellence Canada indicated that further work needs to be done on the process management driver. In response, the OTMPC is building on process mapping work conducted on its financial processes. The organization held a workshop to begin the development of process maps in four areas: trade / JMAs, media relations / familiarization trips, grant program administration and sales solicitation / contracts. This work will be completed in 2015.

In 2014, two assurance audits of the OTMPC's internal control frameworks and compliance with relevant government operating directives and policies (procurement and contract management and travel, meal and hospitality expenses) were initiated by OTMPC through the Ontario Internal Audit Division at the Ministry of Finance. Reports back to OTMPC will be available by the December 2014 Board Meeting with the aim to optimize productivity, efficiency, effectiveness and accountability.

OTMPC commits to operating within its FTE (Full Time Equivalent) staffing cap while accomplishing the organizational culture

shift. The agency completed its restructuring effort and staff has received new organization charts. Two-thirds of staff received updated position descriptions, notably the Corporate and Northern Offices, while work continues to update position descriptions within the OTICs by early 2015.

OTMPC's commitment to staff learning continues for 2015. Several group training and learning initiatives are being planned for an 18-month horizon with a commitment to: Leadership Development Program courses offered to all management/excluded staff, and up to 10 bargaining unit employees with leadership potential will attend some portions of the training. In addition, the following focus will continue: team building with a focus on innovation and creativity, respectful workplace communications, presentation skills, project management, wellness and health and safety training such as first aid and automated external defibrillator (AED). Individually, staff has also been asked to identify two individual training and learning priorities, focusing on opportunities that address gaps in the knowledge / skills / competencies required to fill current duties and responsibilities and, where employees are meeting or exceeding performance expectations, opportunities that support organizational succession planning and preparing employees for advancement within the organization.

4.4 Encourage and reward fact-based decision making

OTMPC will continue to establish and measure key operational and strategic targets using the Balanced Scorecard approach, market intelligence on domestic and international markets, and market forecasts to ensure its marketing endeavours generate results.

4.5 Operate with an investment mindset - be forward looking and find new and innovative products

OTMPC will invest its resources and measure its effectiveness continuously within a context of endeavour geared to generating increased tourism visitation and expenditure results. OTMPC will research national and international tourism agency competitors to discover best practices, and engage collaboratively with stakeholders to market Ontario and Canada to the world.

OTMPC continues to work within its unchanged allocation: $0.425M in resources have been moved from administration and contingency into front-line marketing and industry relations, and the Pan Am marketing activity has been added for 2014-15 and 2015-16 only.

ONTARIO | OTMPC

OTMPC BALANCED SCORECARD: 2015-16 Goals

Operations

Board	Q1	Q2	Q3	Q4
Board Attendance (% members attending meeting)				
14/15 Actual	100%	67%	TBD	TBD
15/16 Goal	100%	100%	100%	100%

Committees 2015/16 Meetings

	Goal	Actual (y-t-d)
RTO	3	2
Sector	3	2
Metrics	3	1
Northern	3	2

OTMPC Corporate	Q1	Q2	Q3	Q4
Y-T-D % of Staff Participated in learning				
14/15 Actual	42.5%	100%	TBD	TBD
15/16 Goal	25%	50%	75%	100%
Learning Plan				
Number Staff who took Training				
14/15 Actual	34	59	TBD	TBD
15/16 Goal	20	20	20	20
Budget Variance to Forecast				
14/15 Actual	+1%	0.92%	TBD	TBD
15/16 Goal	<1%	<1%	<1%	<1%
Presidents' Counsel on Innovation and Creativity				
Goal: Quarterly Meetings				
14/15 Actual	1	*	TBD	TBD
15/16 Goal	1	1	1	1

Training: Social media course, process mapping
*Staff teams developing strategies for staff identified priorities

PLUS ANNUAL

Employee Engagement	2011-12	2014-15	2016-17
Benchmark	73	73	73
Actual	73	*	TBD

NQI Certification	2013-14	2014/15	2016-17
Goal	L2	L2	L3
Actual	L1	** TBD	TBD

*OTMPC results available at after date
** Process mapping workshops scheduled for Sept. 2014 to develop process maps and meet L2 criteria

Partnerships

($000s)	Q1	Q2	Q3	Q4
Sales and Partnerships ($M, includes OTIC sales)				
14/15 Actual	1.40	.76	TBD	TBD
15/16 Goal	0.76	0.62	1.06	1.06
Leveraged Cash				
14/15 Actual	4.40	5.0	TBD	TBD
15/16 Goal	4.40	2.75	1.10	1.10
Leveraged in-kind				
14/15 Actual	0.68	0.30	TBD	TBD
15/16 Goal	0.20	0.30	0.25	0.25

TEMP Support

14/15 # of events supported	142
15/16 Total grants $Ms	2.0

TIPP Support

14/15 # of campaigns supported	11
15/16 Total grants $Ms	0.97

PLUS ANNUAL

Stakeholders' rating of OTMPC Performance	2013-14	2014-15	2015-16
Goal	6.5/10	6.5/10	6.5/10
Actual	*	TBD	TBD

Based on organizations that are very, somewhat or not very familiar with OTMPC. 2013/14 wave rescheduled for Q4 of 2014/15 due to 2014 spring provincial election.

Marketing

Campaign Results	
Campaign ROI	**Summer**
14/15 ON Actual	TBD*
15/16 ON Goal	12.0 : 1
*Available fall 2014	
14/15 Near US Actual	TBD*
15/16 Near US Goal	20.0 : 1
*Available fall 2014	

	Q1	Q2	Q3	Q4
Media Relations Ad Equivalency Value ($M)				
14/15 Actual	22.6	20.0	TBD	TBD
15/16 Goal	21.0	12.0	20.0	15.0
Leisure Trade Trained (cumulative)				
14/15 Actual	3,516	545	TBD	TBD
15/16 Goal	660	660	660	660

Lead Generation (partner click-throughs)				
14/15 Actual	108K	113K	TBD	TBD
15/16 Goal	120K	150K	125K	135K

PLUS ANNUAL

Incremental Trips Generated within Ontario	2013-14	2014-15	2015-16
(1,000s)	190	TBD	TBD

Economic Impact

Border Crossings to Ontario* Calendar Year	Q1	Q2	Q3	Q4
13/14 US Overnight	5.3%	-4.3%	-0.2%	1%
14/15	-10%	2.1%	TBD	TBD
13/14 US Same Day	-7.3%	-9.1%	-11.6%	-2.2%
14/15	-9.6%	-0.5%	TBD	TBD
13/14 Overseas	4.7%	3.3%	2.6%	3.8%
14/15	2.1%	13.6%	TBD	TBD
13/14 UK	0.9%	-2.4%	0.4%	1.3%
14/15	-6.8%	6.8%	TBD	TBD
13/14 China	18.7%	25.9%	19.8%	14.9%
14/15	24.8%	24.6%	TBD	TBD
13/14 Germany	-7.8%	-9.6%	-9%	13.4%
14/15	6%	12.8%	TBD	TBD

*(% change from same period in previous calendar year)

Accomodation – Occupancy (Calendar year)				
13/14	52.3%	64.7%	72.2%	64.4
14/15	54.9%	64.2%	TBD	TBD

Corporate communications	
14/15 Passport Newsletter issues Q1-Q2	2
15/16 Goal	4
14/15 Public Outreach Q1-Q2	23
15/16 Goal	40

PLUS ANNUAL

Visitation and Expenditures			
Visits (M)	2013	2014	2015
Ontarians	124.9	TBD	TBD
US	12.5	TBD	TBD
Overseas	2.3	TBD	TBD
Expenditure ($B)			
Ontarians	$14.0	TBD	TBD
US	$3.4	TBD	TBD
Overseas	$2.9	TBD	TBD
All Markets	$22.7	TBD	TBD

Lagging indicator available post year-end

Measure on track | Measure concerns | Goal not achievable/not achieved

ONTARIO TOURISM MARKETING PARTNERSHIP CORPORATION
2015-16 THREE YEAR PROPOSED BUDGET

		2014/15 Fiscal Budget			Proposed 2015-16 Budget			Proposed 2016-17 Budget			Proposed 2017-18 Budget		
UNIT		Gross	Revenue	Allocation	Gross	Revenue	Allocation	Gross	Revenue	Allocation	Gross	Revenue	Allocation
MARKETING													
Brand Management													
B2C Production	Ontario	1,130	0	1,130	1,200	0	1,200	1,200	0	1,200	1,200	0	1,200
	Canada	80		80	100		100	100		100	100		100
	US	1,270	150	1,120	1,200		1,200	1,200		1,200	1,200		1,200
	International	325		325	400		400	400		400	400		400
	Sub-total	**2,805**	**150**	**2,655**	**2,900**	**0**	**2,900**	**2,900**	**0**	**2,900**	**2,900**	**0**	**2,900**
B2C Canada Distr.	Ontario	2,580	885	1,695	2,720	1,000	1,720	2,720	1,000	1,720	2,720	1,000	1,720
	Canada	0	0	0	100	0	100	100	0	100	100	0	100
	Sub-total	**2,580**	**885**	**1,695**	**2,820**	**1,000**	**1,820**	**2,820**	**1,000**	**1,820**	**2,820**	**1,000**	**1,820**
General Travel		10		10	10		10	10		10	10		10
Promotions		0		0	10		10	10		10	10		10
Creative Services		700		700	750		750	750		750	750		750
Strategic Planning- Agency		1,000		1,000	1,000		1,000	1,000		1,000	1,000		1,000
		7,095	**1,035**	**6,060**	**7,490**	**1,000**	**6,490**	**7,490**	**1,000**	**6,490**	**7,490**	**1,000**	**6,490**
International Markets													
US B2B/C		2,460	250	2,210	2,560	350	2,210	2,560	350	2,210	2,560	350	2,210
China B2B/C		1,800	250	1,550	1,550	250	1,300	1,550	250	1,300	1,550	250	1,300
International B2C		1,845	50	1,795	1,950	50	1,900	1,950	50	1,900	1,950	50	1,900
Travel Trade (Europe, Asia, Latin America)		1,180	85	1,095	1,300	100	1,200	1,300	100	1,200	1,300	100	1,200
In-Market Reps		695		695	700		700	700		700	700		700
General Travel International		20		20	20		20	20		20	20		20
Media Relations International		900		900	980		980	980		980	980		980
Special Projects		280	80	200	300		300	300		300	300		300
		9,180	**715**	**8,465**	**9,360**	**750**	**8,610**	**9,360**	**750**	**8,610**	**9,360**	**750**	**8,610**
TCIS Operations		3,500	0	3,500	3,500	0	3,500	3,500	0	3,500	3,500	0	3,500
TCIS Reserve		700		700	300		300	300		300	300		300
Market Research		800	50	750	800	50	750	800	50	750	800	50	750
TOTAL MARKETING		**21,275**	**1,800**	**19,475**	**21,450**	**1,800**	**19,650**	**21,450**	**1,800**	**19,650**	**21,450**	**1,800**	**19,650**

ONTARIO TOURISM MARKETING PARTNERSHIP CORPORATION
2015-16 THREE YEAR PROPOSED BUDGET

		2014/15 Fiscal Budget			Proposed 2015-16 Budget			Proposed 2016-17 Budget			Proposed 2017-18 Budget		
UNIT		Gross	Revenue	Allocation	Gross	Revenue	Allocation	Gross	Revenue	Allocation	Gross	Revenue	Allocation
INDUSTRY RELATIONS													
Northern Office													
B2C Production	Ontario	180	20	160	260	20	240	260	20	240	260	20	240
	Canada/Quebec	20		20	40		40	40		40	40		40
	US	200		200	250		250	250		250	250		250
	Sub-total	**400**	**20**	**380**	**550**	**20**	**530**	**550**	**20**	**530**	**550**	**20**	**530**
B2C Distribution	Ontario	820	140	680	820	140	680	820	140	680	820	140	680
	Canada/Quebec	140	10	130	140	10	130	140	10	130	140	10	130
	US	2,050	555	1,495	2,050	555	1,495	2,050	555	1,495	2,050	555	1,495
	Sub-total	**3,010**	**705**	**2,305**	**3,010**	**705**	**2,305**	**3,010**	**705**	**2,305**	**3,010**	**705**	**2,305**
General Travel/ Office		130		130	125		125	125		125	125		125
Media Relations		220		220	215		215	215		215	215		215
Travel Trade		80		80	80		80	80		80	80		80
Consumer Shows		300	15	285	290	25	265	290	25	265	290	25	265
Partnerships/Regional Contracts		800		800	800		800	800		800	800		800
Strategic Planning - Agency		200		200	100		100	100		100	100		100
		5,140	**740**	**4,400**	**5,170**	**750**	**4,420**	**5,170**	**750**	**4,420**	**5,170**	**750**	**4,420**
OTICS - OPERATIONS		2,350	750	1,600	2,405	750	1,655	2,405	750	1,655	2,405	750	1,655
TEMP		1,900		1,900	1,900		1,900	1,900		1,900	1,900		1,900
TIPP		1,200		1,200	1,400		1,400	1,400		1,400	1,400		1,400
PARTNERSHIPS (FEI/RO/AO)/TIAO		580		580	580		580	580		580	580		580
SALES		50		50	25		25	25		25	25		25
TOTAL INDUSTRY RELATIONS		**11,220**	**1,490**	**9,730**	11,480	1,500	9,980	11,480	1,500	9,980	11,480	1,500	9,980

ONTARIO TOURISM MARKETING PARTNERSHIP CORPORATION
2015-16 THREE YEAR PROPOSED BUDGET

	2014/15 Fiscal Budget			Proposed 2015-16 Budget			Proposed 2016-17 Budget			Proposed 2017-18 Budget		
UNIT	Gross	Revenue	Allocation	Gross	Revenue	Allocation	Gross	Revenue	Allocation	Gross	Revenue	Allocation
ADMINISTRATION												
Salaries Marketing	3,730		3,730	3,630		3,630	3,630		3,630	3,630		3,630
Industry Relations (excl OTICs)	1,480		1,480	1,480		1,480	1,480		1,480	1,480		1,480
OTICs	2,980	120	2,860	2,980	120	2,860	2,980	120	2,860	2,980	120	2,860
President's Office and Corporate	890		890	890		890	890		890	890		890
Sub-total	9,080	120	8,960	8,980	120	8,860	8,980	120	8,860	8,980	120	8,860
Corp Services												
Human Resources	85		85	75		75	75		75	75		75
IT HQ	360		360	260		260	260		260	260		260
Facilities HQ	600		600	590		590	590		590	590		590
Tele/Supplies/Mail	200		200	200		200	200		200	200		200
Legal/Planning/Audit	30		30	30		30	30		30	30		30
Sub-total	1,275	-	1,275	1,155	-	1,155	1,155	-	1,155	1,155	-	1,155
Communications	50		50	50		50	50		50	50		50
Board of Directors/Committees	125		125	90		90	90		90	90		90
President's Office	20		20	20		20	20		20	20		20
TOTAL ADMINISTRATION	**10,550**	**120**	**10,430**	**10,295**	**120**	**10,175**	**10,295**	**120**	**10,175**	**10,295**	**120**	**10,175**
CONTINGENCY	232	0	232	62	0	62	62	0	62	62	0	62
TOTAL CORPORATION	**43,277**	**3,410**	**39,867**	**43,287**	**3,420**	**39,867**	**43,287**	**3,420**	**39,867**	**43,287**	**3,420**	**39,867**

ONTARIO TOURISM MARKETING PARTNERSHIP CORPORATION
PAN AM PARA PAN AM SPECIAL PROJECTS

	2014/15 Fiscal Budget			Proposed 2015-16 Budget			Proposed 2016-17 Budget			Proposed 2017-18 Budget		
UNIT	Gross	Revenue	Allocation	Gross	Revenue	Allocation	Gross	Revenue	Allocation	Gross	Revenue	Allocation
PAN AM VISITOR ENGAGEMENT												
Visitor Engagement	5,000		5,000	4,000		4,000			0			0
Torch Relay Presence	100		100			0			0			0
Sub-total	5,100	-	5,100	4,000	-	4,000	-	-	-	-	-	-
Travel, office and general expenses	213		213	221		221			0			0
(Note 1)												
Note 1. Salaries & Benefits to be paid by PPAGS												
Expenses related to moving to be reimbursed by PPAGS												
TOTAL	**5,313**	**0**	**5,313**	**4,221**	**0**	**4,221**	**0**	**0**	**0**	**0**	**0**	**0**

	2014/15 Fiscal Budget			Proposed 2015-16 Budget			Proposed 2016-17 Budget			Proposed 2017-18 Budget		
UNIT	Gross	Revenue	Allocation	Gross	Revenue	Allocation	Gross	Revenue	Allocation	Gross	Revenue	Allocation
PAN AM MEDIA PROJECT												
Production	2,423		2,423			0			0			0
Distribution	3,279		3,279	3,021		3,021			0			0
Digital assets	150		150			0			0			0
TOTAL	**5,852**		**5,852**	**3,021**		**3,021**						

CORPORATE PROFILE

MANDATE, ORGANIZATION & OPERATING ENVIRONMENT

Overview
OTMPC was established on November 30, 1998 as set out in Ontario Regulation 618/98 under the *Development Corporations Act*. The regulation was amended by O. Reg. 12/04 on February 9, 2004 and by O. Reg. 271/04 on August 27, 2004. OTMPC is classified as an Operational Service agency under the government's Agency Establishment and Accountability Directive.

Mandate
OTMPC's mandate, as provided for in the regulation, is:

(a) to market Ontario as a travel destination;
(b) to undertake joint marketing initiatives with the tourism industry;
(c) to support and assist the marketing efforts of the tourism industry; and
(d) in cooperation with the tourism industry, the Government of Ontario, other governments and other agencies of governments, to promote Ontario as a travel destination.

The following principles, as stated in the Memorandum of Understanding (MOU) between the Minister and Chair, support the mandate:

(a) OTMPC is to lead the marketing of Ontario as a travel destination nationally and internationally;
(b) OTMPC and regional organizations are to work together to market travel within Ontario;
(c) OTMPC is to deliver marketing services that contribute to regional and economic development;
(d) OTMPC is to become a centre of excellence supporting provincial marketing; and
(e) OTMPC is to engage in partnerships to support the above objectives.

OTMPC's mandate to lead tourism marketing directly supports MTCS's ability to deliver on its mandate to build a strong economy and vibrant communities, attract tourists and contribute to job creation.

Vision
To position Ontario as a preferred global destination.

Mission
To generate increased visitation by Ontario, Canadian and international tourists, enhance tourism expenditures in Ontario, and contribute to provincial economic prosperity through impactful marketing and results oriented investment partnerships.

Governance
OTMPC is governed by a Board of Directors comprised of business leaders who are appointed by the Lieutenant Governor in Council, based on recommendations from the Minister of Tourism, Culture and Sport. The Minister receives advice on Board membership through OTMPC's Governance and Nominations Committee and other interested parties.

In 2011-12, through implementation of the recommendations of an organizational assessment, the Board adopted four distinct Board Committees:

Executive Committee
Sets priorities and recommends objectives and strategies to the Board with the assistance of the HR Sub-Committee.

Finance, Audit and Risk Committee
Reviews financial performance and ensures that effective operating controls are in place.

Governance and Nominations Committee
Undertakes assessment of Board Directors' skills, succession planning and recruitment for Board and advisory committees.

Committees
The Board relies on input from industry committees reporting through committee chairs. In 2012-13, the OTMPC Board

restructured the advisory committees to include:

- an **RTO Advisory Committee** (up to 16 members) that supports the coordination, collaboration and alignment of RTO and OTMPC marketing programs and brand;
- a **Sector Advisory Committee** (up to 19 members) that focuses on tourism experiences as well as brand, core and emerging markets;
- a **Marketing Metrics Advisory Committee** (up to eight members) to ensure appropriate performance measures are in place and reported; and
- a renewed **Northern Tourism Marketing Committee** (up to 17 members) that develops and monitors marketing strategies, tactics and programs for key Northern Ontario markets.

Accountability Relationship
OTMPC is accountable to the Minister, through its Board of Directors and through the Tourism Agencies Branch, for the execution of its mandate.

The Minister is accountable to the Legislature and Treasury Board/Management Board of Cabinet for OTMPC's fulfilment of its mandate, compliance with government policies and reporting to the Legislature on OTMPC's affairs.

The Board is accountable to the Minister for the performance of OTMPC in fulfilling its mandate and for carrying out the roles and responsibilities assigned to the Board by the regulation, Management Board directives, and the MOU with the Minister.

The President and Chief Executive Officer (CEO) is accountable to the Board and Deputy Minister for the management of OTMPC and the supervision of staff while fulfilling the roles and responsibilities assigned by the Board, Management Board directives, the regulation and the MOU.

Staff of OTMPC are accountable to the CEO for carrying out their individual roles and responsibilities as assigned through the CEO.

Management of the OTMPC is led by Chair Jim Marchbank and President and CEO Ronald Holgerson.

Operating Environment
As an operational service agency of the Province of Ontario, OTMPC operates in accordance with the government's operating directives and broad policy directions and is required to operate in accordance with management principles of the Government of Ontario. These principles include ethical behaviour, accountability, excellence in management, wise and prudent use of public funds, high-quality service to the public, fairness in the marketplace, and transparent and competitive procurement. Additionally, as part of its mandate, OTMPC supports government-wide and MTCS priorities as established by the Government of Ontario. It also supports collaboration and information sharing between the private and public sectors.

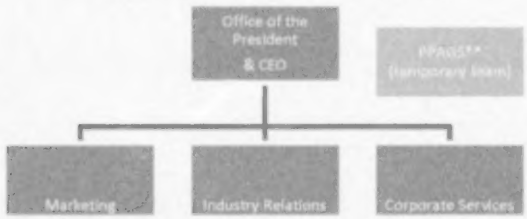
Organizational Structure
OTMPC's head office is located in Toronto with 11 OTICs located across the province (nine operate year-round and two operate on a seasonal basis). OTMPC also manages digital content for 19 kiosks in ONroute service centres, growing to 23 by 2015.

OTMPC employs a total of 88 staff. During the summer months, the OTICs employ 69 students and one seasonal staff. Approximately 14% of the staff are represented by the Association of Management, Administrative and Professional Crown Employees of Ontario (AMAPCEO) and 70% by Ontario Public Service Employees Union (OPSEU). The remaining 14% of staff are management.

Department	FTEs
Office of President & CEO	4
Marketing	31
Industry Relations	14
Travel Centres	32
Corporate Services	7
Total	88

*Note: above FTEs do not include one seasonal staff and approximately 69 students employed at the OTICs. PPAGS Visitor Engagement Team is temporary to October 2015

OTMPC Organizational Chart



**9 FTEs (7 from PPAGS and 2 from MTCS) are temporary to October 2015 for the PPAGS Visitor Engagement Team

Links to the Ministry's Priorities
OTMPC will continue to work with MTCS to help implement key initiatives identified in the current mandate letter from the Premier to the Minister:

Creating a Healthier Ontario through Sport and Active Recreation

Avid and Outdoor Programs
OTMPC will continue to promote nature and outdoor sports, angling, power sports and other activities which foster active healthy living, and physical activity throughout the year in Ontario.

Pan/Parapan Am Games
OTMPC will continue to integrate marketing the Pan Am / Parapan Am games with a tourism message with a focus on the sport tourism segment. OTMPC will continue to work in collaboration with Toronto 2015 Games Organizing Committee, the CTC, the Ministry's Investment Development Office (IDO) and the RTOs impacted by the Games (RTO 2, RTO 3, RTO 5, RTO 6, RTO 7 and RTO11) on a tourism marketing strategy to leverage the 2015 Games.

Building a Dynamic Business Climate

RTOs
OTMPC will continue to work with the tourism industry and regional tourism organizations to support the sector's economic growth and encourage collaboration among tourism industry partners.

Partnering with other Ministries
OTMPC will continue to partner with other ministries to promote Ontario's global competitiveness and attract international investment (e.g. MTO – ONroute service centres / OTICs, MEDEI – Northern and Outdoors programs and Partnerships, MCIIT – OTMPC overseas market representatives in key international markets (Germany, U.K., Japan, China and others).

Live Music Strategy
OTMPC will work together with music industry partners, the Ontario Media Development Corporation and the Ontario Arts Council. Strengthening Ontario's live music scene is part of the Ontario government's plan to boost the economy and create jobs. Continue to showcase local music talent in campaigns to create a competitive and productive sector and to showcase Ontario's talent and expertise.

Promoting Culture, Heritage, and Tourism Agencies and Attractions

Tourism Agencies and Attractions
OTMPC will work with the Government of Ontario's tourism and cultural agencies and attractions to ensure Ontario's cultural and tourism assets are included, where possible, in OTMPC's marketing campaigns to raise their awareness and generate visitation.

Supporting Community Partnerships and Engagement

Aboriginal Communities

OTMPC will continue to build partnerships and engage regions and communities across the province, including Aboriginal communities to identify and develop new Aboriginal product and promote existing best in class Aboriginal tourism experiences.

Involvement in Government-Wide Programs

Accessibility Standards for Customer Service

The Accessibility Standards for Customer Service came into effect on January 1, 2008. OTMPC continues to be in compliance with outlined service standards. Going forward, OTMPC will revise documents as its programs and services change.

French Language Services

OTMPC is committed to communicating in both official languages and ensures that marketing and communications materials are available in both English and French.

Ontario Service Directive

OTMPC will support the Ontario Public Service's (OPS's) commitment to improve the quality of customer service it provides to clients.

Financial Partnerships

OTMPC was established on the principle of working in partnership with the public and private sector to market Ontario as a travel destination. Through partnerships with industry, OTMPC is able to extend the reach and duration of marketing programs for the benefit of both the industry and the province.

OTMPC partners with industry in the following three ways:

1. **OTMPC-Led Marketing Campaigns (cash)**
   Revenue is generated by OTMPC from industry partners for participation in OTMPC-led and delivered programs. Examples include advertising sold in print and digital campaigns.

2. **Industry-Led Marketing Campaigns (leverage)**
   OTMPC invests in industry-led projects in which OTMPC provides funding that is instrumental in the initiation of the project or in which OTMPC provides funding into an existing program and benefits from the joint marketing campaign. In 2014-15, OTMPC provided marketing assistance through TEMP to almost 150 festivals and events. In addition, 11 consortia received marketing assistance for their own industry-led campaigns from TIPP.

3. **Industry Contributions (in-kind)**
   Industry partners donate their goods and services in the participation of OTMPC-led and delivered programs. For example, OTMPC works with industry partners to support media familiarization tours. Industry provides in-kind services such as accommodations, transportation, meals and attractions admission to visiting media.

CORPORATE COMMUNICATIONS PLAN

Objectives

- To demonstrate OTMPC's role in positioning Ontario as a preferred global destination.
- To communicate OTMPC's marketing and partnership strategies and generate interest in opportunities of collaboration.
- To raise awareness of OTMPC's activities and achievements to industry stakeholders, media and the general public.

Strategic Approach

- A proactive, multimedia communications strategy targeted at internal and external stakeholders that communicates benefits of partner engagement and enhances the reputation of OTMPC as a leader and effective tourism marketer.

Audiences

Internal

- OTMPC staff, MTCS, other relevant government ministries, etc.
- OTMPC Board of Directors and advisory committee members

External

- Industry partners/individual operators
- RTOs
- DMOs
- Sector associations (i.e. Resorts of Ontario, Attractions Ontario, Festivals & Events Ontario, etc.)
- Tourism Industry Association of Ontario (TIAO)
- Tourism Industry Association of Canada
- CTC
- Travel and trade media (i.e., Canadian Travel Press, Marketing Magazine, etc.)
- General media

Key Messages

Build and Deliver the Case for Investment

- OTMPC works with its partners, including the TIAO, RTOs, DMOs and sector associations to demonstrate the economic value and impact of the tourism industry.
- OTMPC works with government ministries and other government-supported organizations to share in marketing efforts for driving tourism to Ontario. For example, the Toronto 2015 Pan Am/Parapan Am Games are an opportunity for several areas of collaboration.

Build a Powerful Brand that Drives Results

- Ontario's tourism industry must successfully compete for the attention of the traveller in a globally competitive market.
- Ontario's provincial brand will be positioned as a destination of choice by aligning efforts with tourism partners and demonstrating a strong presence in the marketplace.
- Ontario will showcase a strong international tourism brand in leading key markets, working with national partner the CTC, to increase visitation and spend.
- OTMPC will drive marketing campaigns where key performance indicators are identified and measured.

Develop and Execute An Effective Partnership Strategy

- Partnerships are core to OTMPC's mandate and to supporting its relationships with the tourism industry in order to increase tourist visitation and expenditures in Ontario.
- OTMPC has implemented enhancements to its partnership programs that align with its marketing mandate and strategic priorities.
- OTMPC will consult with industry and develop a partnership strategy with a goal to increase partnership participation in OTMPC programs by traditional and non-traditional partners.

Embrace Organizational Innovation and Effectiveness

OTMPC encourages its Board and Committee members to utilize their role by strengthening relationships with industry, building awareness of OTMPC programs and activities and sharing the value of the tourism economy.

OTMPC cultivates a strong team through a culture of teamwork, engagement and learning.

- OTMPC embraces market research and continually works to improve the quality of its marketing programs and services.
- OTMPC establishes clear goals through a balanced scorecard approach and communicates its results though ongoing news and communications.
- OTMPC provides high-quality service to stakeholders while delivering efficient and effective programs.

Anticipated Outcomes

- OTMPC demonstrates a leadership role in the areas of brand, marketing activities and programs, and consumer and partner information services.
- Industry supports OTMPC's goals through support of and partnership investment in OTMPC activities.
- OTMPC is recognized by tourism industry partners and other stakeholders as a strong tourism marketer for Ontario provincially, nationally and internationally.

Communications Tactics and Timeline

Activity	Q1 (Apr-June 2015)	Q2 (July-Sept 2015)	Q3 (Oct-Dec 2015)	Q4 (Jan-Mar 2016)
Reports				
Annual Report		X		
Marketing Plan				X
Electronic Communications				
www.tourismpartners.com	X TCIS Release 3 (improvements to partner site)	X	X	X
Ontario Passport e-newsletter	X	X	X	X
E-mail information blasts	As required	As required	As required	As required
Linkedin (posting of Passport, job postings, other relevant information)	X	X	X	X
Events/Meetings				
OTMPC presentations at industry events	X (as required)	X (as required)	X (as required, Ontario Tourism Summit	X (as required)
OTMPC Events	X (Tourism Week/Ontario Tourism Day, Rendez-vous Canada, OTMPC booths at trade shows)	X (OTMPC booths at trade shows)	X (Travel Services Conference, OTMPC booths at trade shows)	X (OTMPC booths at trade shows)
Media Relations				
News Releases	X (as required, e.g., Tourism Week, TEMP announcements, summer campaign)	X (as required, e.g., fall campaign)	X (as required, e.g., Tourism Marketing Awards, winter campaign)	X (as required, e.g., spring campaign)
Media Inquiries	X (as required)	X (as required)	X (as required)	X (as required)
Award Submissions				
	X Marketing Magazine Awards	X Canadian Tourism Awards, MTCS Applause Awards, Canadian Marketing Awards	X (as determined)	X (as determined)

Risk Management 2015-16				
Risk Category	**Risk**	**Mitigation**	**LIKELIHOOD**	**IMPACT**
1. Financial Risk	**Risk:** Higher media buying and production costs in traditional media channels such as TV is too expensive and Ontario's tourism profile is reduced. **Risk:** Marketing undertaken under direction of Cabinet Office is not reimbursed. **Risk:** A preliminary ruling from the Canada Revenue Agency (CRA) with a high financial impact ($4.7M in arrears plus $1.2M annually starting in 2014-15)	**Mitigation:** OTMPC continues to shift its marketing from traditional media "channels" to more responsive and cost-effective digital marketing. OTMPC repurposes existing assets where possible. **Mitigation:** OTMPC historically is directed by Cabinet Office to seek full reimbursement via a Treasury Board submission in Q4. **Mitigation:** Potential risk to organization is $4.677M in HST arrears. OTMPC and MTCS staff have been negotiating with CRA towards a resolution. MGS has agreed to pursue Appendix "A" exemption. It is the position of OTMPC, MTCS and Ministry of Finance that OTMPC is eligible for 100% of the Net Tax Refund.	**3**	**3**
2. Operational Risk	**Risk:** Not completing projects to high standards and on time. **Risk:** In the event of a prolonged labour disruption or emergency, marketing and partnership activities could be delayed and fewer services will be available to the public.	**Mitigation:** Develop critical paths with partners on all initiatives. Project management discipline and executive oversight governance are being applied to the multi-year redevelopment of OTMPC's websites, call centre and databases. **Mitigation:** Business continuity plans for maintaining service have been updated.	**3**	**4**
3. Human Resources Risk	**Risk:** Inability to attract and retain the best-qualified staff if positions are unfilled or contracted temporarily. May result in lower confidence by industry partners, staff and board.	**Mitigation:** Recruitment for succession to begin in advance of position vacancies where possible. Improved workplace practices and performance are being pursued via Excellence Canada's level 2 (operating best practices) certification. Staff is expected to complete skills training. Employee engagement is measured through a bi-annual process.	**3**	**3**

4. Information Risk	**Risk:** Ineffective or inappropriate performance measures can negatively impact program management and results.	**Mitigation:** A balanced scorecard has been adopted by the board (measures are added or deleted as appropriate and approved by the Board). Advisory committees, including a marketing metrics committee, meet regularly to share information and gauge the effectiveness of campaigns. Industry and OTIC consumers are surveyed and responses analyzed.	1	1
5. Strategic Risk	**Risk:** Failure to address the well-funded Brand USA marketing initiative could erode Ontario as a desirable tourism destination. Failing to meet the expectations of stakeholders will negatively impact OTMPC's reputation and could reduce tourism receipts.	**Mitigation:** OTMPC continues to market to cross border and short-to-mid-haul U.S. markets. Investments are being made in OTMPC's digital technology, a newly opened Toronto OTIC within high-traffic Union Station, and a new, emotionally-appealing research-based Ontario tourism brand for visitors from outside the province.	3	3
6. Stakeholder / Public Opinion Risk	**Risk:** Falling stakeholder satisfaction and failure to meet the expectations of the public, other governments, ministries, or tourism industry stakeholders will negatively impact government's and OTMPC's reputation.	**Mitigation:** New stakeholder advisory committees have been implemented to share and align market intelligence. Industry surveyed annually and responses analyzed. Changes to programs, such as one deadline for TEMP, are communicated in advance to affected event organizers.	1	3
7. Legal / Compliance Risk	**Risk:** Unfavourable legal outcomes could result in negative media coverage or monetary obligations.	**Mitigation:** Legal Services Branch has been engaged on any issues. Potential financial implications are nominal.	1	1
8. Technology Risk	**Risk:** Overreliance on digital marketing to reach consumers and assist with trip planning and closing the sale.	**Mitigation:** Investments are being made in various marketing channels (digital technology, new or refreshed OTICs and a research-based Ontario tourism brand for use in various media). Digital marketing is more responsive and cost-effective than traditional media.	3	1
9. Governance Risk	**Risk:** Failure to meet deadlines and requirements could contravene regulations and directives. **Risk:** Failure to address the recommendations of external reviews could draw negative attention from stakeholders.	**Mitigation:** OTMPC works with the ministry to meet timelines and reporting criteria. **Mitigation:** Most recommendations from previous reviews have been implemented. A new balanced scorecard and marketing metrics advisory committee help evaluate operating effectiveness.	1	3

10. Capital Risk	**Risk:** Capital upgrades are not undertaken because premises are leased or capital funding is unavailable.	**Mitigation:** Head office location is new as of 2008. MTO provided two new OTIC locations in 2011. Seven OTICs were closed in 2012. Ministry provided capital in 2013 to update OTICs. New Toronto OTIC in Union Station in 2014.	**1**	**2**

Likelihood		Impact	
5	Almost certain	5	High - Consequences would threaten the survival or continued effective operation of the activity, or attract adverse media attention, and require top-level management or ministerial intervention.
2 3 4	Moderately likely	2 3 4	Medium - Consequences would not threaten the activity (i.e. a process, program, project, or initiative) but would mean that the activity could be subject to significant review or changes.
1	Rare	1	Low - Consequences would threaten the efficiency or effectiveness of some aspect of the program or function but could be dealt with internally.